

**CONCERN**  
worldwide

ENDING  
EXTREME POVERTY  
WHATEVER  
IT TAKES

# Invitation to Tender

**Tender Reference: CW-CMS-HQ-042023**

**Invitation to Tender for the Provision of a:**  
**Sensitive Complaints Reporting and Case**  
**Management System**  
**(3 year Framework Agreement)**

**TENDER DOSSIER**

## Letter of Invitation to Tender

Dear Sir/Madam,

**SUBJECT: Invitation to tender for the provision of a “Sensitive Complaints Reporting and Case Management System”**

Concern Worldwide is seeking to establish a framework agreement with a quality service provider to provide Concern Worldwide with a Sensitive Complaints Reporting and Case Management System. Concern Worldwide hereby invites proposals from suitably qualified service providers.

Further to your enquiry regarding the publication of the above-mentioned Invitation to Tender, please find enclosed the following documents, which constitute the tender dossier:

### Tender Dossier

- **Instructions to Tenderers** (Appendix 1)
- **Concern’s Terms and Conditions** (Appendix 2)
- **Company Details & Profile** (Appendix 3)
- **Tenderer’s Relevant Experience** (Appendix 4)
- **Technical Proposal & Questionnaire** (Appendix 5A & 5B)
- **Financial Proposal** (Appendix 6)
- **Tenderer’s Declaration** (Appendix 7)

### Additional Documentation

- **Anti-Trafficking in Person Policy (Annex 1)**
- **Child Safeguarding Policy (Annex 2)**
- **Programme Participant Protection Policy (Annex 3)**
- **Anti-Fraud Policy (Annex 4)**
- **Whistle Blowing Policy (Annex 5)**

We look forward to receiving your tender by electronic copy on or before **3pm Thursday 25<sup>th</sup> May 2023** by email at the email address specified in the tender dossier. See “Instruction to Tenderers” for more details.

Your tender bid must include the following documentation so please use the list below as a ‘Checklist’ before submitting your tender to Concern.

Description	Checklist
<b>Company Details &amp; Profile</b> <i>Completed (Appendix 3)</i>	
<b>Company Tax Clearance Certificate</b>	
<b>Tenderers Relevant Experience Form</b> <i>Completed (Appendix 4)</i>	
<b>Technical Proposal &amp; Questionnaire completed Signed &amp; Stamped (Appendix 5A &amp; 5B)</b>	
<b>Financial Proposal Signed &amp; Stamped (Appendix 6)</b>	
<b>Tenderers Declaration</b> <i>Signed &amp; Stamped (Appendix 7)</i>	
<b>Audited Copy of Financial Statement for 2022</b>	

## Appendix 1 – Instructions to Tenderers

### Concern Worldwide

Concern Worldwide is an International NGO, headquartered in Ireland with offices in the UK, USA and Republic of South Korea and with a mission to alleviate poverty and hunger in some of the world's least developed and most disadvantaged countries across Africa, Asia, the Caribbean and the Middle East. Concern currently operates in 25 countries.

Concern's future ambition, set out in the 2021-25 strategy, focuses on achieving four main goals:

- Goal 1: Reaching the Furthest Behind First
- Goal 2: Driving Urgent Action on Hunger, Conflict and the Climate Crisis
- Goal 3: Galvanising Global Support Across Every Generation to End Extreme Poverty
- Goal 4: Being a Diverse, Inclusive and People-Focused Organisation

The Concern strategy 2021-25 articulates what the organisation will prioritise in the period and builds on progress already made in a number of key areas, including: safeguarding and protection. It also builds on advances in our internal systems and our digital transformation. Further information about Concern's vision, mission and identity is available at <https://www.concern.net/>.

Concern reaches a direct audience of over 2.5 million people annually, including beneficiaries, partner organisations, suppliers and contractors. In addition, Concern directly employs approximately 4,000 staff.

### Registration and Constitution

Concern Worldwide is a registered charity in the Republic of Ireland and a registered charity in the UK.

#### 1. Submission of tenders

Tenders must be delivered as follows by **email only**:

Please submit offers electronically by email before **3pm Thursday 25<sup>th</sup> May 2023** to: [tenders@concern.net](mailto:tenders@concern.net) and please also make reference to the following:

- Tender Reference Number: **CW-CMS-HQ-042023**
- Company name
- Attachment title
- Number of Attachments

All information provided must be perfectly legible.

#### 2. Timetable for provision

Line	Item	Date
1.	ITT published	28 <sup>th</sup> April 2023
2.	Closing date for clarifications	19 <sup>th</sup> May 2023, 11.30am (GMT)
3.	Closing date and time for receipt of tenders	Thursday 25 <sup>th</sup> May 2023, 3.00pm (GMT)
4.	Tender opening location	By Microsoft Teams @ Concern Worldwide, Dublin
5.	Tender opening date and time	26 <sup>th</sup> May 2023, 3pm (GMT)

### 3. Language of offers

All tenders must be submitted in English.

### 4. Period of validity of offers

All bids must be valid for a minimum of **90 days** from the tender submission deadline date.

### 5. Currency

All financial proposals must be in EURO (€). The successful tenderer must issue all invoices in EURO (€) for the duration of the contract.

### 6. Type of contract

A fixed term framework agreement will be signed with the successful tenderers. The agreement will be for 3 years with the option of a further 1-year extension if agreement is satisfactory to both parties at the end of the 3-year period. Tenderers are required to provide a detailed and comprehensive price proposal as part of their bid.

**See Appendix 6.**

### 7. Content of tenders / Essential Criteria

All tender submissions must be submitted by email with the following contents:

Description
Company Details & Profile <i>Completed (Appendix 3)</i>
Company Tax Clearance Certificate
Tenderers Relevant Experience Form <i>Completed (Appendix 4)</i>
Technical Proposal & Questionnaire completed Signed & Stamped (Tenderers own format)
Financial Proposal Signed & Stamped (Appendix 6)
Tenderers Declaration <i>Signed &amp; Stamped (Appendix 7)</i>
Audited Copy of Financial Statement for 2022

### 8. Opening of tenders

The tender opening date and time will be **Friday May 26th 2023 @ 3pm (Irish Time)**. The opening will be completed online over Microsoft Teams and tenderers are invited to the opening should they wish to do so. Please note that the opening will be only to number and acknowledge the receipt of all bids. Following the tender opening session, the tender committee will then evaluate all bids over the following 3 weeks. Tenderers will be notified if they have been shortlisted or not following the evaluation.

### 9. Evaluation of tenders

Concern will use a three part evaluation criteria for the tender process – administration, technical and financial offer by Tenderers and Formal Presentation if required (shortlisted Tenderers). The Tender Evaluation Committee will award the contract to the bidder whose bid has been determined to be substantially responsive following the complete evaluation criteria mentioned below.

- **Stage 1 – Administrative (Pass or Fail)**

The evaluation during this stage is to review bid responses for purposes of assessing compliance to ensure that all documents requested are submitted and signed as per the tender dossier. Only tenderers who have successfully passed the administrative stage will move forward for further evaluation in Stage 2.

- **Stage 2 – Technical & Financial Proposal**

For the technical evaluation, a weighted scoring process is used. The technical section is made of various technical requirements in the form of a questionnaire (See Appendix 5B) with each requirement scored using a weighted value of 1 for Desirable & 2 for Mandatory. Ratio breakdown for this evaluation is set to 70% for the technical

component and 30% for the financial offer. Please note that the lowest price will not be the sole criterion and Concern reserve the right to consider all Tenderers technical bids while evaluating their respective financial bids. No commitment of any kind, contractual or otherwise will exist unless and until a formal contract has been executed by Concern Worldwide. Tenderers will be expected to pass a minimum point total for Stage 2 of the evaluation process in order to move on to the presentation stage (If a shortlist of tenderers is required).

- **Stage 3 – Formal Presentation (shortlisted Tenderers)**

A shortlist of tenderers may be established if required. Short-listed tenderers will be requested to make formal presentations, regarding their Proposal to Concern. Key tenderer management and technical personnel will be expected to participate in the presentations. This process is used to validate claims made in the proposal and confirm the tenderers ability to meet the requirements in the Competitive Bid. The presentations must be made at no cost to Concern. Based on information obtained at the presentation, vendors' scores may be adjusted. The presentation to Concern Worldwide will either be carried out online over MS Teams or at our Dublin H.Q. The presentation will be confirmation, explanation and validation in relation to the technical and financial proposal submitted.

## 10. Clarification & Queries

Any clarification, queries or additional information relating to the tender dossier required by potential tenderers should be sent to the following email address [clarifications@concern.net](mailto:clarifications@concern.net)

**Please Note:** Requests for clarification no later than: **19<sup>th</sup> May 2023, 11.30am (GMT)**

## 11. Cancellation of the tender procedure

The Tender Evaluation Committee reserve the right to cancel the tender procedure under the following circumstances:

- Non-receipt of a minimum quality number of bids
- The costs exceed budgetary limits
- Concern no longer require an external Sensitive complaints reporting and case management system

## 12. Appeals Process

Should a tenderer or potential tenderer for this tender have any issue, which they feel requires appealing, they should contact the Dominic Crowley at the following email address: [dominic.crowley@concern.net](mailto:dominic.crowley@concern.net)

## 13. Data Protection

Concern guarantees that all procurement activities are transparently documented for internal or donor audit purposes. Concern guarantees confidentiality of the procurement process.

## 14. VAT

*All tenderers need to be aware that Concern Worldwide is not VAT registered for the purpose of EU VAT directives. Please take this into consideration when making your financial bids.*

## Appendix 2 – Terms & Conditions

### CONCERN WORLDWIDE PURCHASING TERMS & CONDITIONS

Unless the context indicates otherwise, the term “Buyer” refers to Concern Worldwide. The term “Service Provider” refers to the entity named on the order and contracting with the Buyer. The term “Contract” can be taken to mean either (a) the purchase order or (b) the supply agreement, whichever is in place.

#### GENERAL TERMS & CONDITIONS

1. **Price:** The prices stated on the order shall be held firm for the period and / or quantity unless specifically stated otherwise.
2. **Source of Instructions:** The Service Provider shall not seek nor accept instructions from any source external to Concern Worldwide in relation to the performance of the contract.
3. **Assignment:** The Service Provider shall not assign, transfer, sublet or subcontract the contract or any part thereof without the prior written consent of the Buyer.
4. **Corruption:** The Service Provider shall not give, nor offer to give, anyone employed by the Buyer an inducement or gift that could be perceived by others to be a bribe. The Service Provider agrees that a breach of this provision may lead to an immediate end to business relationships and termination of existing contracts.
5. **Confidentiality:** All data, including but not limited to, maps, drawings, photographs, estimates, plans, reports and budgets that has been compiled by or received by the Service Provider under the contract shall be the property of Concern Worldwide and shall be treated as confidential. All such data should be delivered to the authorized officials representing the Buyer upon request.
  - The Service Provider may not communicate at any time to any other person, government or authority external to Concern Worldwide, any information that has been compiled through association with Concern Worldwide which has not been made public except with written authorisation from the Buyer. These obligations do not lapse upon termination of the contract.
6. **Use of Emblem or Name:** Unless otherwise agreed in writing; the Service Provider shall not advertise nor make public the fact that it is supplying goods or services to the Buyer, nor shall the Service Provider in any way whatsoever use the name or emblem of Concern Worldwide in connection with its business or otherwise.
7. **Observance of Law:** The Service Provider shall comply with all laws, ordinances, rules and regulations bearing upon the performance of its obligations under the terms of the contract.
8. **Force Majeure:** The meaning of the term can be taken to mean acts of God, war (declared or not), invasion, revolution, insurrection or acts similar in nature or force.
  - In the event of and as soon as possible after the occurrence of any cause deemed force majeure, the Service Provider must inform the Buyer of the full particulars in writing. If the Service Provider is rendered unable either in part or in whole to perform its obligations then the Buyer shall take such action as it considers, in its sole discretion, to be appropriate or necessary in the circumstances.
  - If the Service Provider is permanently rendered incapable in whole or part by reason of force majeure to complete its obligations and responsibilities under the contract then the Buyer will have the right to suspend or terminate the contract on the same terms and conditions laid out in Section 9, Cancellation.

- 9. Cancellation:** The Buyer reserves the right to cancel the contract should it suspend its activities or through changes to its mandate by virtue of the Executive Council of Concern Worldwide and/or lack of funding. In such a case the Service Provider shall be reimbursed by Concern Worldwide for all reasonable costs incurred by the Service Provider, including all materials satisfactory delivered and conforming to specification and terms of contract, prior to receipt of the termination notice.
- Should the Service Provider encounter solvency problems including, but not limited to, bankruptcy, liquidation, receivership and similar, the buyer reserves the right to terminate the contract immediately without prejudice to any other right or remedy it may have under the terms of these conditions.
- 10. Warranty:** The Service Provider shall provide the Buyer with all manufacturers' warranties. The Service Provider warrants that all goods supplied in relation to the contract meets specification, is defect free and is fit for the purpose of the intended use. If, during the warranty period, the goods are found to be defective or non-conforming to specification, the Service Provider shall promptly rectify the defect. If the defect is permanent then at the choice of the Buyer the Service Provider will either replace the item at their cost or reimburse the Buyer.
- 11. Inspection and Test:** The Service Provider must inspect the goods prior to dispatch to ensure conformance to specification and/or any other provisions of the contract. The Buyer reserves the right to inspect the goods for compliance with specifications and provisions of the contract. If, in the Buyers' opinion, the goods and/or services do not comply with the specification, the Buyer will inform the Service Provider in writing. In such a case the Service Provider shall take the necessary action to ensure compliance, liability for any additional cost incurred for rectifying compliance will rest with the Service Provider.
- 12. Changes:** The Buyer reserves the right to make reasonable changes at any time to the specification, drawings, plans, quantity, packing instructions, destination, or delivery instruction. If any such change affects the price of goods or performance of service the Service Provider and Buyer may negotiate an equitable adjustment to the contract, provided that the Service Provider claims for adjustments in writing to the Buyer within 30 days from being notified of any change.
- 13. Export Licence:** If an export licence or licences are required for the goods, the Service Provider has the responsibility to obtain that licence or licences.
- 14. Payment Terms:** Unless otherwise agreed, payment terms will be net 30 days from receipt of a correctly prepared invoice.
- 15. Ethics:** The Conduct to which Concern expects all of its suppliers to respect is as follows;
- Suppliers must adhere to International Labour Organisation (ILO) labour conventions, particularly international labour standards, social protection and work opportunities for all.
  - Employment is freely chosen.
  - The rights of staff to freedom of association and to collective bargaining are respected.
  - Working conditions are safe and hygienic.
  - No exploitation of children is tolerated.
  - Wages paid are adequate to cover the cost of a reasonable living.
  - Working hours are not excessive.
  - No discrimination is practiced.
  - Regular employment is provided.
  - No harsh or inhumane treatment of staff is tolerated.
  - Local labour laws are complied with.
  - Social rights are respected

Additionally, by acceptance by a supplier, service provider or contractor of a Concern supply, service or works contract, they understand and agree to abide by the terms of the Concern Code of Conduct and associated policies (Programme Participant Protection Policy, Child Safeguarding Policy and Anti-Trafficking in Persons Policy).

**16. Environmental Standards:** Service Providers should as a minimum, comply with all statutory and other legal requirements relating to environmental impacts of their business. Areas that should be considered:-

- Waste Management
- Packaging and Paper
- Conservation
- Energy Use
- Sustainability

**17. Rights of Concern Worldwide:** Should the Service Provider fail to perform under the terms and conditions of the contract, including but not limited to failing to obtain export licenses or to make delivery of all or part of the goods by the agreed delivery date(s), the buyer may, after giving reasonable notice to the Service Provider, exercise one or more of the following rights:

- Procure all or part of the goods from an alternate source, in which event the Buyer may hold the Service Provider liable for additional costs incurred.
- Refuse to accept all or part of the goods.
- Terminate the contract.

**17.1.** The contract will be terminated in the event of corrupt, fraudulent, collusive and/or coercive practices and the European Community will be informed where such practices may affect their financial interests.

**18. Rights of access for audit purposes:** Concern Worldwide is contractually obliged to facilitate certain donor's direct access to Service Providers for audit purposes. This obligation is extended to all Concern Service Providers.

**19. No Agency:** This order does not create a partnership between the Buyer and Service Provider or make one party the agent for the other for any purpose.

**20. ECHO Compliance:** All Concern Suppliers must be compliant with supply, works and service contracts awarded within the framework of humanitarian actions financed by the European Union. (Ref: ECHO FPA, Annex III).

**21. Donor Compliance:** All Concern Suppliers must be compliant with supply, works and service contracts awarded within the framework of humanitarian actions financed by all donors financing Concern programmes in all countries that Concern have a presence.

**22. GDPR:** Concern Worldwide will only contract with organisations who can demonstrate that they are in compliance with the General Data Protection Regulation (EU 2016/679) and who will enter into appropriate contractual data controller – data processor agreements which satisfy the requirements of Article 28 of the GDPR.



## Appendix 3 – Administration (Company Profile & Details)

### 1. Company Contact Details

Please provide a company profile including details of company history. This should include a list of the main areas and scope of business activities. Please also include the following information:

<b>Name of Tenderer</b>	<b>VAT / Tax register number</b>
<b>Company Name</b>	<b>Directors' names and titles / Key personnel</b>
<b>Registered address of Company</b>	<b>Parent company (If Applicable)</b>
<b>Telephone</b>	<b>Ownership</b>
<b>Email Address</b>	<b>Associated Companies (If Applicable)</b>
<b>Website Address</b>	<b>Contact details (Primary Contact &amp; Secondary Contact)</b>
<b>Year established</b>	

### 2. Company Profile

- a. **Organizational Structure:** Please give an outline of the structure of you company including number of employees etc.
- b. **Top five (5) Clients:** Please list your top five (5) Clients in the International Development and Aid sector and indicate the size of their business with your company as a percentage of your annual turnover in your last financial year.
- c. **Similar Projects:** Please indicate or give details of any similar provision of Sensitive Complaints Reporting and Case Management System – particularly experience provision to the International Development and Humanitarian Aid sector.
- d. **Yearly Turnover:** Please provide overall turnover for your company over the past 3 years
- e. **Subcontractors:** Please give details as to whether it is proposed to subcontract any part of this work. If so, what structures will be put in place to ensure a seamless service? Please provide potential subcontractor profile and details as per administration section of the tender dossier.
- f. Any Other Relevant Information:

### 3. Essential Documentation

Please provide copies of the following:

- Copy of Tax clearance Certificate
- Copy of most recent audited financial statements

## Appendix 4 – Tenderers Relevant Experience

Please list 3 (three) appropriate client references for services solutions provided within the past 3 years similar in nature to Concern Worldwide requirements. These companies / Organisations may be contacted for the purpose of taking up references and need to have agreed to such an approach.

*Please do not include Concern Worldwide or Concern staff as a reference.*

1	<b>Name</b>	
	<b>Organisation</b>	
	<b>Address</b>	
	<b>Phone</b>	
	<b>Email</b>	
	<b>Nature of supply</b>	
	<b>Approximate value of contract</b>	
2	<b>Name</b>	
	<b>Organisation</b>	
	<b>Address</b>	
	<b>Phone</b>	
	<b>Email</b>	
	<b>Nature of supply</b>	
	<b>Approximate value of contract</b>	
3	<b>Name</b>	
	<b>Organisation</b>	
	<b>Address</b>	
	<b>Phone</b>	
	<b>Email</b>	
	<b>Nature of supply</b>	
	<b>Approximate value of contract</b>	

## **Appendix 5 (A) Technical Proposal & 5 (B) Technical Questionnaire**

### **• Appendix 5 (A) – Technical Proposal**

#### **Supply of a Sensitive Complaints Reporting and Case Management System**

##### **Scope of the Work**

The external environment has heightened expectations on the international development sector to ensure effective policies and systems are in place to prevent and respond to safeguarding and fraud and to implement protection mainstreaming as a core approach in all programmes. These standards are reflected in the Core Humanitarian Standards (CHS) as well as institutional funding requirements, such as ECHO, UN and FCDO. In 2021, Concern created a dedicated Protection and Safeguarding Strategy and Framework (PSSF) to provide strategic direction to strengthen our capacity to be a 'safe organisation'. Strategic Objectives two and three specifically speak to our compliance and accountability aims, with a clear commitment to comprehensive protection and safeguarding policies, strategies, systems and guidance in place, as well as having a safe, accessible, responsive and empowering Speak Up culture. A key area of development is the need to "consider introducing a global 'reporting and case management platform', internally built or externally sourced". In addition, the 2019 staff survey revealed that staff wanted to see more reporting pathways and greater confidentiality in safeguarding.

Currently in Concern Worldwide, complaints reporting tools vary across our support and programme countries; including hotlines, complaints boxes, email and web based reporting through our website. Investigations and case management are recorded on the bespoke internal CoSafe system which is becoming obsolete as the technology it is based on (InfoPath) is being degraded.

A business case was presented to the Concern Senior Management Team in May 2022, which gave initial approval for the procurement of a reporting and case management platform for sensitive cases, referred to as the 'Speak Up system'. Concern Worldwide intends to source and implement a formal, centralised system to receive reports of misconduct and conduct case management, through one comprehensive platform.

##### **Objectives & Requirements**

The aim of the Speak Up System project is to procure and implement a global system that can receive all sensitive complaints and manage all exchanges on a case; document all stages of decision making; demonstrate accountability for decisions made; and close the loop by recording the delivery of key recommendations and actions. It should be a single secure place to find all information on cases (current and archived), from initial reports to final outcome. It should be a single secure place to find all information on cases (current and archived), from initial reports to final outcome.

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Sensitive complaints in Concern are defined as all safeguarding, fraud, serious HR grievances, or wrongdoing complaints.

##### **A. Work package A Reporting system:**

###### **The reporting system requirements are:**

1. A webform and hotline which should be independent, universally accessible, context specific, available out of hours, tailored to vulnerable groups (including children and people with disabilities).
2. The webform and hotline which must be available in multiple languages, particularly the official languages of the countries where we work<sup>1</sup>.
3. The reporting platform must allow for Concern brand customization.

4. Additional reporting channels would be an advantage, such as WhatsApp, voice recognition software, and offline reporting.
5. The service provider should provide options for (and cost where applicable) translation of report language into English.
6. The webform should be accessible in contexts with low bandwidth and unstable connections.

#### **B. Work package B. Case Management system:**

**The case management system requirements are:**

1. Migration of current cases and case archive from existing system
2. Access for approx. 60 system users with various permission levels
3. Option for creating automated case flow to appropriate team based on report categories
4. Creation of multiple case management teams based on category of complaint
5. Must include advanced search functions within the system
6. Option to link cases related to a single individual (particularly subject of complaint)
7. Secure two way communications feature between investigators and other stakeholders
8. Uploading and storage of all investigation related files and notes related to a case up to 10GB, including option to add folders to organise case documentation
9. Case log and audit trail function of all interactions related to the case
10. Default or custom responses/acknowledgement emails
11. Feature to record investigation outcomes and case status
12. Case archiving for historical referencing (min of 7 years)
13. If possible, include recommendations from cases and tracking of action implementation
14. If possible, allow referral to support services from within the system

#### **C. Additional system requirements:**

**The system must include the following features:**

1. Generate dashboard analytics
2. Export reports, raw data, graphs etc.
3. Training support, such as user manuals, online training modules etc.
4. Be hosted within the European Union
5. Comply with EU GDPR
6. Comply with European whistle-blower protection laws
7. High level security, such as two factor authentication or equivalent
8. If possible, compatible with Google Translate or MS Translation

<sup>2</sup> List of countries where Concern works: [Where we work](#) plus Ukraine.

#### **D. Service provider support requirements are:**

1. Host system (3 years minimum)
2. Provide customization and set up support
3. If possible, provide roll out support including training to users and IT systems staff
4. Provide technical support for future iterations, troubleshooting etc.

### **Content and Format of Proposals**

Service tenderers may wish to submit a proposal to address the following service provision options:

- Option 1: Work package A. Reporting system only (+ Completed Technical Questionnaire)
- Option 2: Work package B. Case Management system only (+ Completed Technical Questionnaire)
- Option 3: Both Work packages A. Reporting system and B. Case Management system (+ Completed Technical Questionnaire)

In addition, all proposals must address how they meet the *C. Additional system requirements* and *D. Service provider support requirements*.

All proposals should be submitted in the form of a written document structured to follow the sequence of the sections above.

**Please Note:** All tenderers should also complete the Technical Questionnaire provided in Appendix 5 (B). The questionnaire should be viewed as part of the proposal and is used to ensure the key points are included in the proposal. If the points laid out in the questionnaire are included in the proposal, please indicate the page number where this can be found (a column is provided in the questionnaire for this purpose).

NB: If the Supplier is unable to provide detail against any of the sections at this point in time they should advise when they expect to be in a position to provide full detail based on their proposed approach and methodology.

## Appendix 5 (B) – Technical Questionnaire

Please submit this Technical Questionnaire (further below) as part of the proposal documentation.

Guidance for completing the technical questionnaire:

1. Requirements are indicated as Mandatory (M) or Desirable (D). Mandatory requirements will be assessed as part of the shortlisting process and only tenderers that can meet all the mandatory requirements will be considered for shortlisting if a shortlist is required.
2. Endeavour to answer all questions listed below under the **4** separate sections. Answer with a Yes (Y), No (N) or Partially (P) for all questions.
3. Provide adequate evidence that you meet this requirement and reference the page number from the proposal where this information or additional information can be found.

## Work Package A: Reporting System

Ref.	M/ D	System Requirement	Yes (Y), No (N), Partially (P)	Evidence (Required only if not referenced in the proposal provided. Ensure page reference of evidence in proposal is provided)	Page Ref. from proposal
<b><u>1.1</u></b>	M	A webform which should be independent, universally accessible, context specific, available out of hours, tailored to vulnerable groups (including children and people with disabilities).			
<b><u>1.2</u></b>	D	A hotline which should be independent, universally accessible, context specific, available out of hours, tailored to vulnerable groups (including children and people with disabilities).			
<b><u>1.3</u></b>	M	The webform must be available in multiple languages, particularly English and French.			
<b><u>1.4</u></b>	D	The hotline which must be available in multiple languages, particularly the official languages of the countries where we work.			

<b><u>1.5</u></b>	M	The reporting platform must allow for Concern brand customization.			
<b><u>1.6</u></b>	D	Additional reporting channels would be an advantage, such as WhatsApp, voice recognition software, and offline reporting.			
<b><u>1.7</u></b>	M	The service provider should provide options for (and cost where applicable) translation of report language into English.			
<b><u>1.8</u></b>	M	The webform should be optimized for low bandwidth and unstable connections.			

<b>Work package B. Case Management system</b>					
Ref.	M/D	System Requirement	Yes (Y), No (N), Partially (P)	Evidence (Required only if not referenced in the proposal provided. Ensure page reference of evidence in proposal is provided)	Page Ref. from proposal
<b><u>2.1</u></b>	D	Import templates for migration of current cases and case archive from existing system			
<b><u>2.2</u></b>	M	Access for approx. 60 system users with various permission levels			
<b><u>2.3</u></b>	M	Option for creating automated case flow to appropriate team based on report categories			

<b><u>2.4</u></b>	M	Creation of multiple case management teams based on category of complaint			
<b><u>2.5</u></b>	M	Must include advanced search functions within the system			
<b><u>2.6</u></b>	M	Option to link cases related to a single individual (particularly subject of complaint)			
<b><u>2.7</u></b>	D	Secure two way communications feature between investigators and other stakeholders within the system			
<b><u>2.8</u></b>	M	Uploading and storage of all investigation related files and notes related to a case up to 10GB, including option to add folders to organise case documentation			
<b><u>2.9</u></b>	M	Case log and audit trail function of all interactions related to the case			
<b><u>2.10</u></b>	D	Default or custom responses/acknowledgement emails			
<b><u>2.11</u></b>	M	Feature to record investigation outcomes and case status			
<b><u>2.12</u></b>	M	Case archiving for historical referencing configurable			
<b><u>2.13</u></b>	D	Include recommendations from closed cases and tracking of action implementation			
<b><u>2.14</u></b>	D	Allow referral to support services from within the system			



<b>Additional system requirements:</b>					
Ref.	M/D	System Requirement	Yes (Y), No (N), Partially (P)	Evidence (Required only if not referenced in the proposal provided. Ensure page reference of evidence in proposal is provided)	Page Ref. from proposal
<b><u>3.1</u></b>	M	Generate dashboard analytics			
<b><u>3.2</u></b>	M	Export reports, raw data, graphs etc.			
<b><u>3.2</u></b>	M	Training support, such as user manuals, online training modules etc			
<b><u>3.4</u></b>	M	Be hosted within the European Union			
<b><u>3.5</u></b>	M	Comply with EU GDPR			
<b><u>3.6</u></b>	M	Comply with European whistle-blower protection laws			
<b><u>3.7</u></b>	D	High level security, such as two factor authentication or equivalent			
<b><u>3.8</u></b>	D	If possible, compatible with Google Translate or MS Translation			

Service provider support requirements					
Ref.	M/D	System Requirement	Yes (Y), No (N), Partially (P)	Evidence (Required only if not referenced in the proposal provided. Ensure page reference of evidence in proposal is provided)	Page Ref. from proposal
<b><u>4.1</u></b>	M	Provide customization and set up support			
<b><u>4.2</u></b>	D	If possible, provide roll out support including training to users and IT systems staff			
<b><u>4.3</u></b>	M	Provide technical support for future iterations, troubleshooting etc.			



ENDING  
EXTREME POVERTY  
WHATEVER  
IT TAKES

## Appendix 6 – Tenderer’s Financial Proposal

### Financial Proposal

Tenderers are required to provide a detailed and comprehensive price proposal i.e. all costs associated the bidder’s proposal must be clearly specified and included in the total bid price. The proposed total bid must be inclusive of all required services as outlined in the scope of work and technical proposal.

Please provide an estimate of each resource you plan to deploy to the project (e.g. developer, project manager, trainer etc.), their daily rate, estimated number of days and total euro cost.

## Appendix 7 – Tenderer’s Declaration

As part of their tender, each tenderer must submit a signed declaration using the following format as a guide.

In response to your letter of invitation to tender for the above contract, we, the undersigned, hereby declare that:

1. We have examined and accept in full the content of the dossier for invitation to tender (Including Concern’s Code of Conduct and associated policies):

**Tender Reference No.** \_\_\_\_\_ of **Date:** \_\_\_\_\_ we hereby accept its provisions in their entirety, without reservation or restriction.

2. This tender is valid for a period of **90 days** from the final date for submission of tenders.
3. We will inform Concern immediately if there is any change in the above circumstances at any stage during the implementation of the contract. We also fully recognise and accept that any inaccurate or incomplete information deliberately provided in this application may result in our exclusion from this and other contracts of the contracting authority.
4. We note that Concern is not bound to proceed with this invitation to tender and that it reserves the right to award only part of the contract.
5. We agree to adhere to all of the terms and conditions of the contracting authority as provided in the tender dossier.
6. We confirm that we are not engaged in any corrupt, fraudulent, collusive or coercive practices and acknowledge that if evidence contrary to this exists, Concern reserves the right to terminate the contract with immediate effect.
7. We are not bankrupt or being wound up, are having our affairs administered by the courts, have not entered into an arrangement with creditors, have not suspended business activities, are not the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations.
8. We have not been convicted of an offence concerning professional conduct by a judgment which has the force of res judicata.
9. We have not been guilty of grave professional misconduct proven by any means which the contracting authority can justify.
10. We have fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which we are established or with those of the country of the contracting authority or those of the country where the contract is to be performed.
11. We have not been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the European Communities financial interests.
12. We are not currently subject to an administrative penalty referred to in Article 96(1) of the European Commission Financial Regulation.
13. We are not subject to a conflict of interest in accordance with Article 94(a) of the European Commission Financial Regulation.
14. We confirm that we have read and understand the Concern Code of Conduct and associated policies (Programme Participant Protection Policy, Child Safeguarding Policy and Anti-Trafficking in Persons Policy) and agree to abide by the terms of these policies in all of our activities under any Concern supply, service or works contract.

Additionally we commit to abide by the points listed below;

- Employment is freely chosen
- The rights of staff to freedom of association and to collective bargaining are respected
- Working conditions are safe and hygienic
- No exploitation of children is tolerated

- Wages paid are adequate to cover the cost of a reasonable living
- Working hours are not excessive
- No discrimination is practiced
- Regular employment is provided
- No harsh or inhumane treatment of staff is tolerated
- Local labour laws are complied with
- Social rights are respected

Additionally, we confirm that we have read and understand the Concern Code of Conduct and associated policies (Programme Participant Protection Policy, Child Safeguarding Policy and Anti-Trafficking in Persons Policy) and agree to abide by the terms of these policies in all of their activities under a Concern supply or service contract.

**15. Environmental Standards**

Suppliers should as a minimum, comply with all statutory and other legal requirements relating to environmental impacts of their business. Areas which should be considered are:

- Waste Management
- Packaging and Paper
- Conservation
- Energy Use
- Sustainability

**NAME & FIRST NAME:**

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**TITLE:**

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**DULY AUTHORISED TO SIGN ON BEHALF OF:**

---

**PLACE & DATE:**

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**COMPANY STAMP:**

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